my|CalPERS

System Privileges
For
Business Partner Roles

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Purpose

The purpose of this document is to provide System Access Administrators (SAA) a list of system privileges for each Business Partner role in my|CalPERS. The document should be used as a resource when an SAA sets up their organization's Business Partner Profile and assigns roles to their users, functions and appropriate level of access that each user will need to perform to complete their tasks in my|CalPERS. These roles will be unique to each Business Partner based on your specific organizational needs, and security and confidentiality practices.

If you have any questions regarding the information contained within this document, please contact PERT via email at CalPERS_PERT4U@calpers.ca.gov.

ROLE:	Business Partner AP/Billing RO (Read Only)
SYSTEM PRIVILEGES:	• Initiate electronic payments to CalPERS to cover financial obligations at CalPERS • Maintain and view details of the electronic payment account to pay current payment obligations • View billing and payment information by program and fiscal year • View previous electronic payment transactions • View member categories which are super funded • Maintain super funded accounts • View details of warrant disbursement • View how warrant statuses, actions and dispositions change over time • View list of fees assessed or waived for an employer • View current and historical employer rate data • View summary of information related to a receivable

ROLE:	Business Partner Employer Inquiry
SYSTEM PRIVILEGES:	• Initiate electronic payments to CalPERS to cover financial obligations at CalPERS • Maintain and view details of the electronic payment account to pay current payment obligations • View billing and payment information by program and fiscal year • View previous electronic payment transactions • View member categories which are super funded • Maintain super funded accounts • View details of warrant disbursement • View how warrant statuses, actions and dispositions change over time • View list of fees assessed or waived for an employer • View current and historical employer rate data • View summary of information related to a receivable

ROLE:	Business Partner Employer Maintenance
SYSTEM PRIVILEGES:	• Review and edit business partner summary demographics, addresses, contacts and contracts and agreements • Maintain business relationships (view/edit) • Add an organization that doesn't exist in system • Review business partner merger history • Submit documentation • Review documents • Review, update Supplemental Income Plan (SIP) agreement information • Review SIP rate summary • View preprocessed data for submitted reports • View file upload history • View, update list of saved inquiries • Review case summary and details, update information submitted • View review findings* • Review merger history* • Submit inquiries • Review summary of statutory program • Review member rate history by statutory program, member category and Collective Bargaining Unit CBU • Review program event history • Create, review, and update SIP agreements • Order publications * Functionality to be included in future release

ROLE:	Business Partner Health Contracts
SYSTEM PRIVILEGES:	• Review business partner summary demographics, addresses, contacts, and contracts and agreements • Select contract/agreement type • Submit documentation • Create, review, update, and delete groups related to the health contract • Create, review, and delete custom vesting schedule • Review and update vesting schedule list, merger event • Create equal employer share contributions for selected benefit type • Review criteria values for member category, CBU or division criteria • Add, update retiree information • Review health contract information/history • Create, review, and update optional provisions at group level • Create, review, update, and delete benefit types • Review contract and group details • Update contract termination details • Review subscribers whose health enrollment will be terminated as a result of termination of a contract or group • Review health plan details relative to health contract • Review eligible retirees for an associated health contract • Review member rate history • Review update medical group assignment details • Review summary of Social Security/Medicare agreement and exclusion information • Review contract documents • Create and edit health enrollment reports • Review and update merged agency list* • Review school district organization changes* • Create, review, and update agreements * Functionality to be included in future release

ROLE:	Business Partner Health Enrollment
SYSTEM PRIVILEGES:	• Submit documentation • View summary of health enrollment for primary subscriber • View a covered person's health enrollment details • Review primary subscriber's health enrollment summary • Review details for particular health transactions • Create, review, and update covered person list • Upload health enrollment file • Create, review, update, and delete health enrollment records • View review findings • Review death notification summary and details • Create, update, view, and delete contacts captured during death notification • Review health carrier list

ROLE:	**Business Partner Health Enrollment RO (Read Only)**
SYSTEM PRIVILEGES:	• View summary of health enrollment for primary subscriber • View a covered person’s health enrollment details

ROLE:	**Business Partner Limited**
SYSTEM PRIVILEGES:	• Review and business partner summary demographics, addresses, contacts, and contracts and agreements

ROLE:	Business Partner PA Billing
SYSTEM PRIVILEGES:	• Set up payment for portion or all of remaining principle balance • Select payment method and account for funding payment • Review payments for a payment account • Set up automatic payments for certain receivable types • Review current invoice and invoice history • Review monthly billing roster View billing and payment information by program and fiscal year

ROLE:	Business Partner Payroll
SYSTEM PRIVILEGES:	• Review member's service history by fiscal year • Review participant current balance, previously generated participant account statements, contributions and service credit details for a given program • Review recent balance of third-party administered Supplemental Income Plan, defined benefit records and defined contributions accounts by participant • Review transaction history by fiscal year Review service history details for a particular pay period and service credit status history

Business Partner Payroll RO (Read Only)
• Review and edit business partner summary demographics, addresses, contacts, and contracts and agreements • Review addresses for a business partner • Review business partner contact information • Review existing participant address and communication information • Review documentation • Review history of file uploads • Review list of inquiries • Review information related to reciprocal agreement • Review cases • Review agreements

Business Partner Retirement Contracts

- Review and edit Business Partner Summary demographics, addresses, contacts, and contracts and agreements
- Review, create, and update census data details, local system transfer details
- Review retirement contract information
- Review progress of new retirement contract, create exclusions, update cost scenarios
- Construct cost scenarios for valuation
- Update information to initiate a retirement contract
- Provide CalPERS with list of potential positions, select positions for amending a contract
- Submit documentation
- Identify member categories included in retirement contract
- Review Social Security or Medicare only agreement information
- Upload file
- Review, create, update, and delete retirement enrollment reports/records
- Review direct authorization deductions
- Review, update Golden Handshake (two years additional service credit) details
- Review Employer Paid Member Contribution (EPMC) details
- Review information on covered employees included in provision or reclassification for state and resolution or memorandum for public agency
- Review and update special compensation labor agreement details
- Review schedule of agency actions during contracting process
- Indicate and review amendment actions
- Review, create, and update amendment valuation actions
- Review, and update written employer resolution labor agreement summary
- Review, and update tax-deferred member contribution details
- Review, update criteria for groups of employees for reclassification or provision coverage
- Review valuation cost summary
- Review benefit provision details for member category
- Review, update, and remove exclusion summary/list
- Review, update cost share details
- Review cost share history
- Review, update valuations request details
- Select criteria values for member category or CBU
- Submit list of agencies to be merged and view cases and merger progress
- Review current and historical employer rate data

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Business Partner Retirement Contracts

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- Select valuation for the amendment
- Initiate amendment to retirement contract
- Review, update retirement termination summary
- Edit termination reasons for a contract termination
- Select final compensation cost option selection and view valuation reports
- Review reciprocal agreement summary
- Review school district reorganization changes
- Review business partner merger history
- Create, review, and update reciprocal agreements
- Review, create, and update CBU list
- Review payment details for third-party payees

Business Partner Retirement Enrollment

- Review, update, and delete census data
- Review, and update participant address and communication information
- Provide CalPERS with list of potential positions and select positions for amending a contract
- Submit documentation
- Review summary information to begin a benefit estimate
- Review estimate results
- Upload file
- Review, create, update, and delete retirement enrollment reports/records
- Review, create, update, and delete appointment history
- Create or edit retirement enrollment report
- Review retirement contract summary
- Submit information to complete request for reinstatement/re-employment
- Review findings
- Review determination details
- Review death notification summary and details
- Create, update, view and delete contacts captured during death notification
- Review health transaction details
- Review history of site changes for an employee at a single appointment
- Review, update contributory appointment history

Business Partner Retirement Enrollment RO (Read Only)

- Review and update appointment history
- Review history of site changes for an employee at a single appointment

Business Partner Supplemental Income Plan
• Select contract/agreement type • Initiate agreement • Submit qualifying agreement information for Supplemental Income Plan (SIP), Social Security or Medicare only agreement • Upload file of employee information • Review SIP agreement details • Freeze contributions, submit termination agreement request or make provision changes to maintain SIP agreements • Review, create, and update SIP agreements

Business Partner SCP Certification (Service Credit Purchase)
• Submit documentation • Upload file of employee information • Review, create, update, and delete special compensation details • Review submitted records • Review and update employment certification requests • Create, review, and update service period records • Review and update service credit purchase determination information • Review and update reciprocal eligibility determination information • Review member’s contribution adjustment cost information